TEAM-Web User Guide

Chapter 10
TEAM-Web Administration

By:
ActioNet

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Chapter 10 Change History

Version	Date	Description	Change By
1.0	09/26/2007	Initial Online Versions and updates	Travis Klein
1.1	10/18/2005	Formatting Changes and Updates	Travis Klein, Sonya Ransome
1.2	10/02/2006	Addition of Earmark Administration and Query Features	Sonya Ransome
2.0	04/23/2007	Major Formatting Changes and updates as required	Travis Klein
2.01	06/20/2007	Continued Formatting changes and updates	Travis Klein
2.02	06/21/2007	Formatting changes and indexing	Travis Klein
2.03	02/29/2008	Minor reference modifications	Travis Klein
2.1	06/30/2008	Delete Closeout amendment updates	Travis Klein
2.2	11/05/2010	Update screen shot for figure 16, added DBE new functions for DBE Release ver. 5.0	Mei Sum Lee(Yvonne)
2.3	02/10/2011	Update screen shot and added unlock button in TEAM Administration module	Mei Sum Lee(Yvonne)

** Note: previous versions of the online User Guide may have been updated as needed without consistent versioning. Some previous change versions may be omitted or estimated. Versioning shall be consistent henceforth.*

Chapter 10 Table of Contents

TEAM-Web Administration

Overview

This chapter will detail the following system features: Earmark Administration (Earmark Query), Help Desk Utilities (including Change Project Number, Delete Project, Delete Milestones, and Delete User Locks), and Security (including Add User and Modify User).

Earmark Administration

To access the Earmark Administration feature, first expand the Navigational Menu under TEAM Administration by clicking on the plus sign to the left of words TEAM Administration, then click on the plus sign to the left of the words Earmark Administration (see Figure 1)

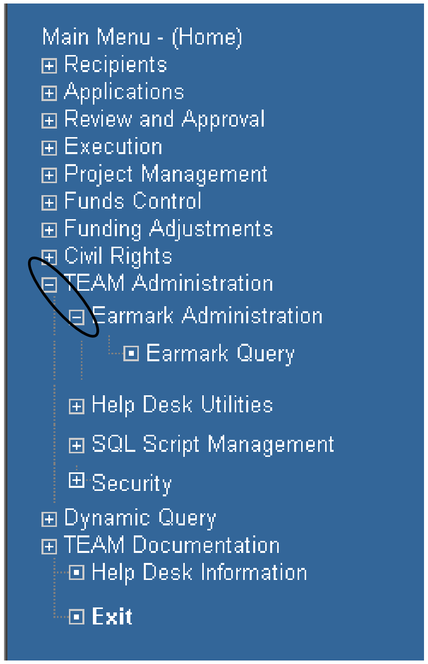


Figure 1

Earmark Query

1. Click on the words Earmark Query and a query screen will appear to the right (see Figure 2)
2. Enter search criteria and click the Submit button. Earmark records matching the search criteria will be displayed.

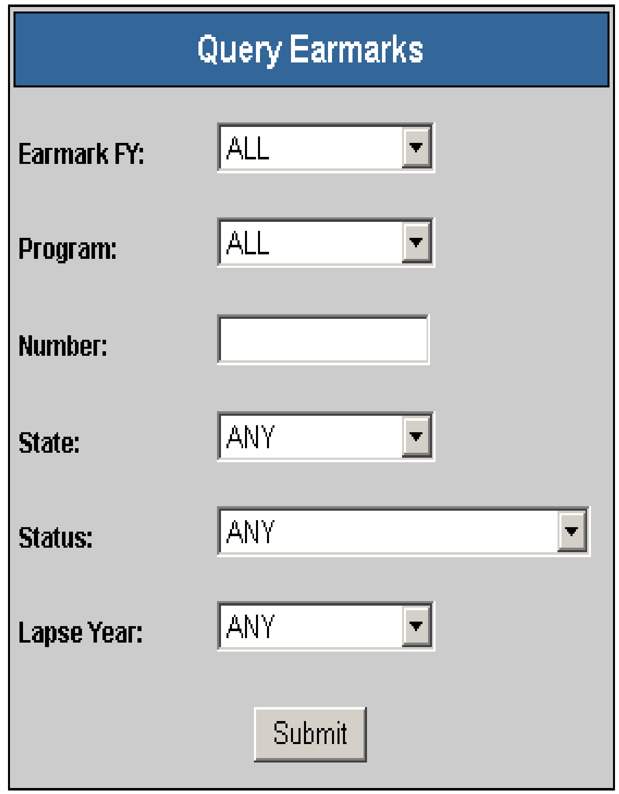


Figure 2

3. To update an Earmark, click on an Earmark ID link at the top of the screen (see Figure 3).
4. Once the record is highlighted, click on the Edit button at the bottom of the screen. Once clicked, the button will convert to the Update button.
5. Access to update earmark fields is dependent upon individual user roles assigned in the Security screen. Users with Earmark Administration roles have access to update the Status, Comments, Earmark Manager, and Recipient ID fields. Users with the

additional roles Earmark HQ Manager or Earmark Financial Manager will have access to update a majority of the earmark fields.

6. Once changes are completed, click the Update button.

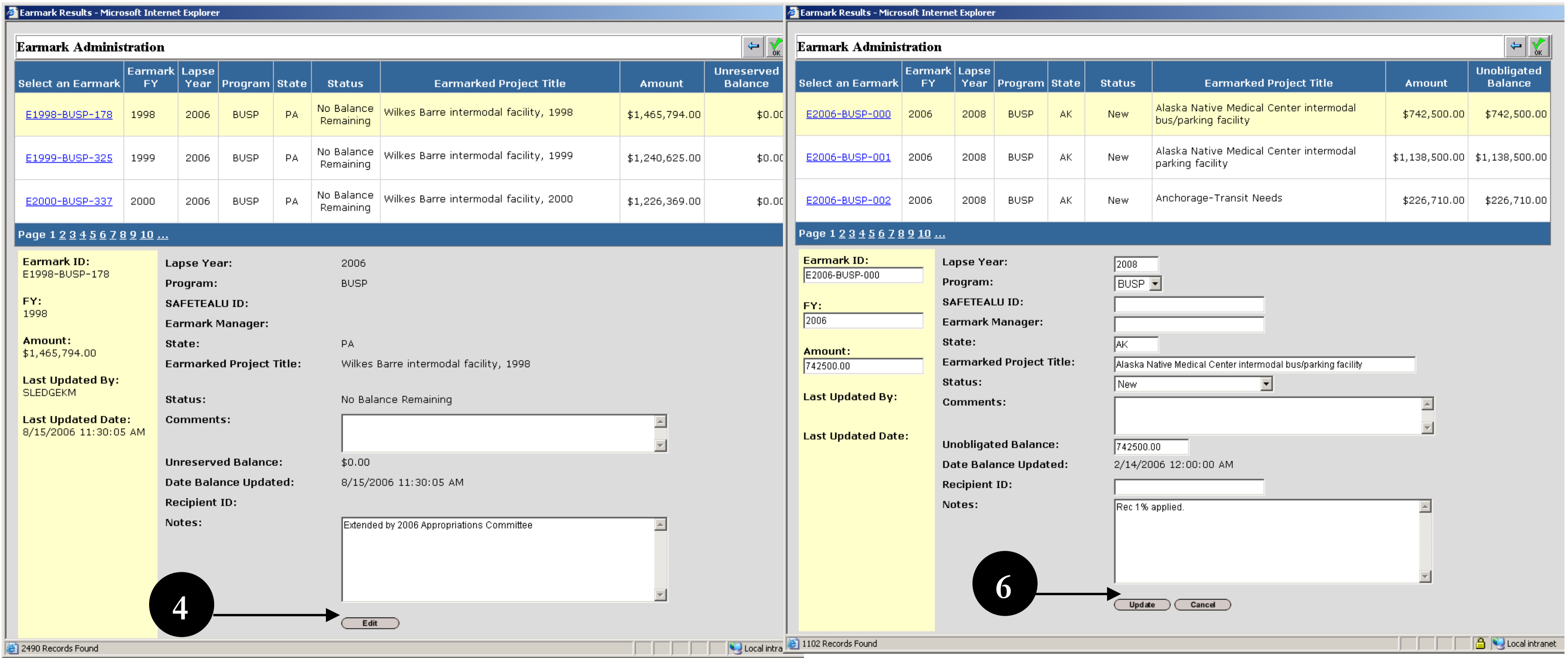
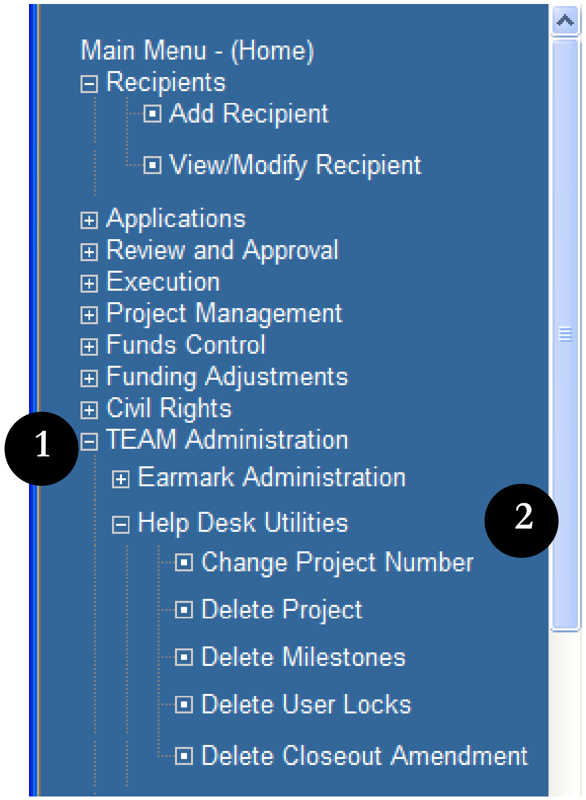


Figure 3

Help Desk Utilities

1. Access the Help Desk Utilities by first expanding the menu under TEAM Administration by clicking on the plus sign to the left of it (see Figure 4)
2. Click on the words Help Desk Utilities and a query screen will appear to the right and the remaining submenu items will become viewable.
3. Enter your application search requirements and hit enter or click on Submit Query.



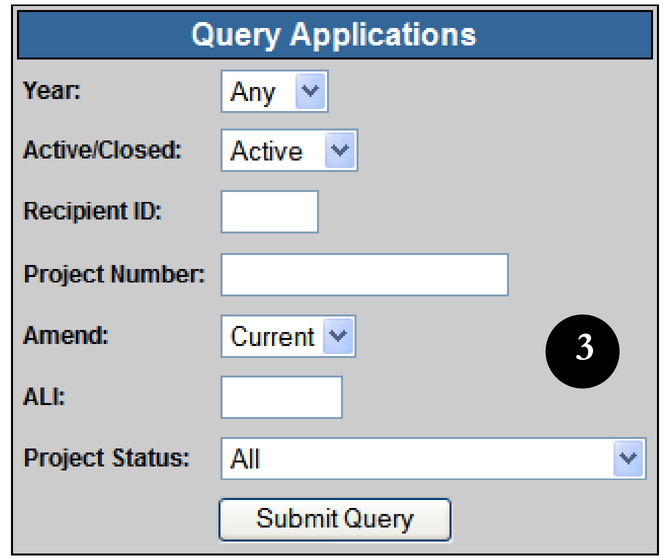


Figure 4

Change Project Number

1. After Querying for your project and selecting the Change Project Number feature, enter in the new project number data by the State, Section ID, Activity, and Sequence number (see Figure 5).
2. If you would like to reset to the existing project number, click on the Reset button.
3. Certain Section ID's can only be selected depending on the chosen Section of Statute. If an unacceptable Section ID is entered, TEAM will give the user a system message notifying them and providing them with a list of permissible Section ID's for that Section of Statute.
4. Once you have entered in the new project number information, click on the Submit button.

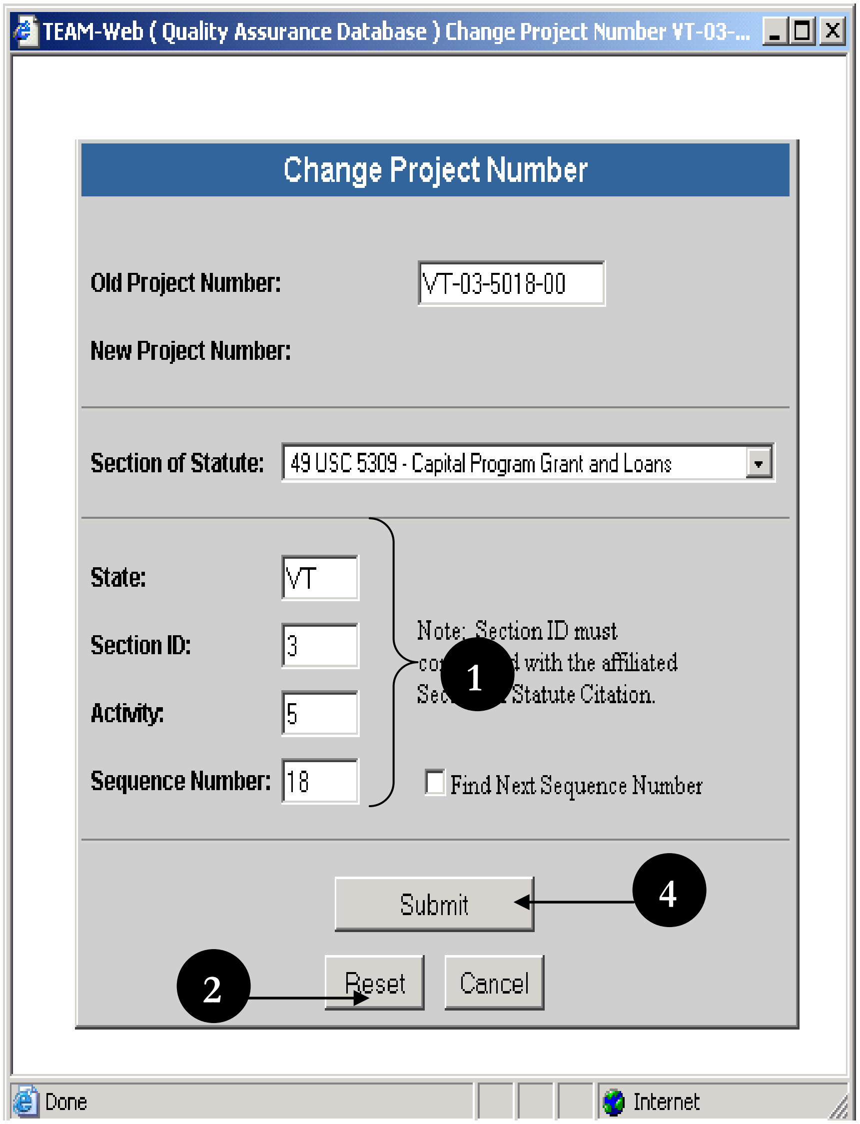

TEAM-Web (Quality Assurance Database) Change Project Number VT-03-...
Change Project Number
Old Project Number:
VT-03-5018-00
New Project Number:
Section of Statute:
49 USC 5309 - Capital Program Grant and Loans
State:
VT
Section ID:
3
Activity:
5
Sequence Number:
18
Find Next Sequence Number
1
2
4
Submit
Reset
Cancel
Done
Internet

Figure 5

Delete Project

1. First query for a project and highlight the desired project by clicking on it.
2. Then click on the words Delete Project in the main menu under Help Desk Utilities (see Figure 6)
3. A message box with pop up asking whether or not you are sure you would like to delete the project.
4. If you are sure that you would like to delete the project then click on the OK button.

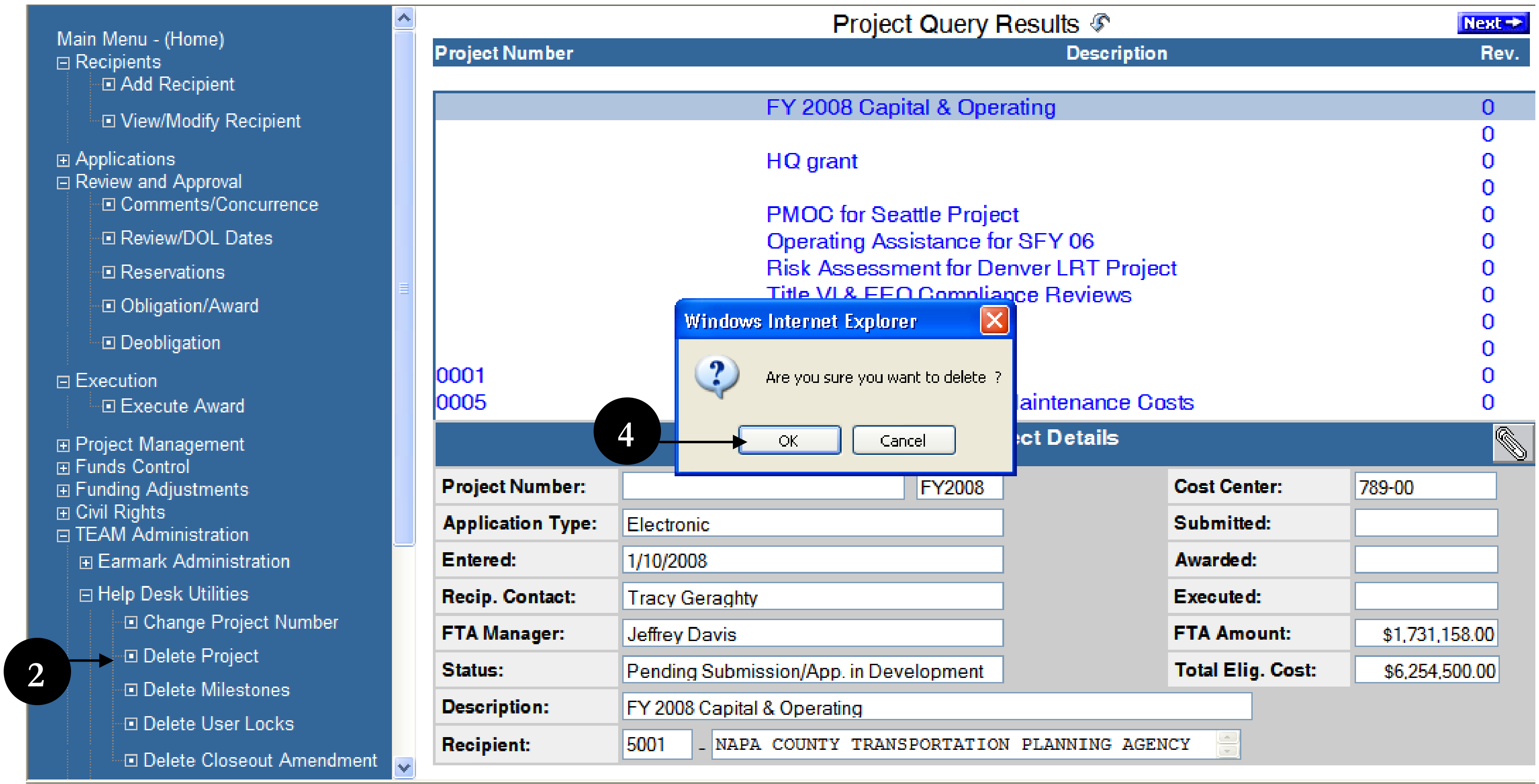


Figure 6

Delete Milestones

1. First query for a project and highlight the desired project by clicking on it.

2. Then click on the words Delete Milestones in the main menu under Help Desk Utilities (see Figure 7).
3. A message box with pop up asking whether or not you are sure you would like to delete the milestones.
4. If you are sure that you would like to delete the project's milestones then click on the OK button.

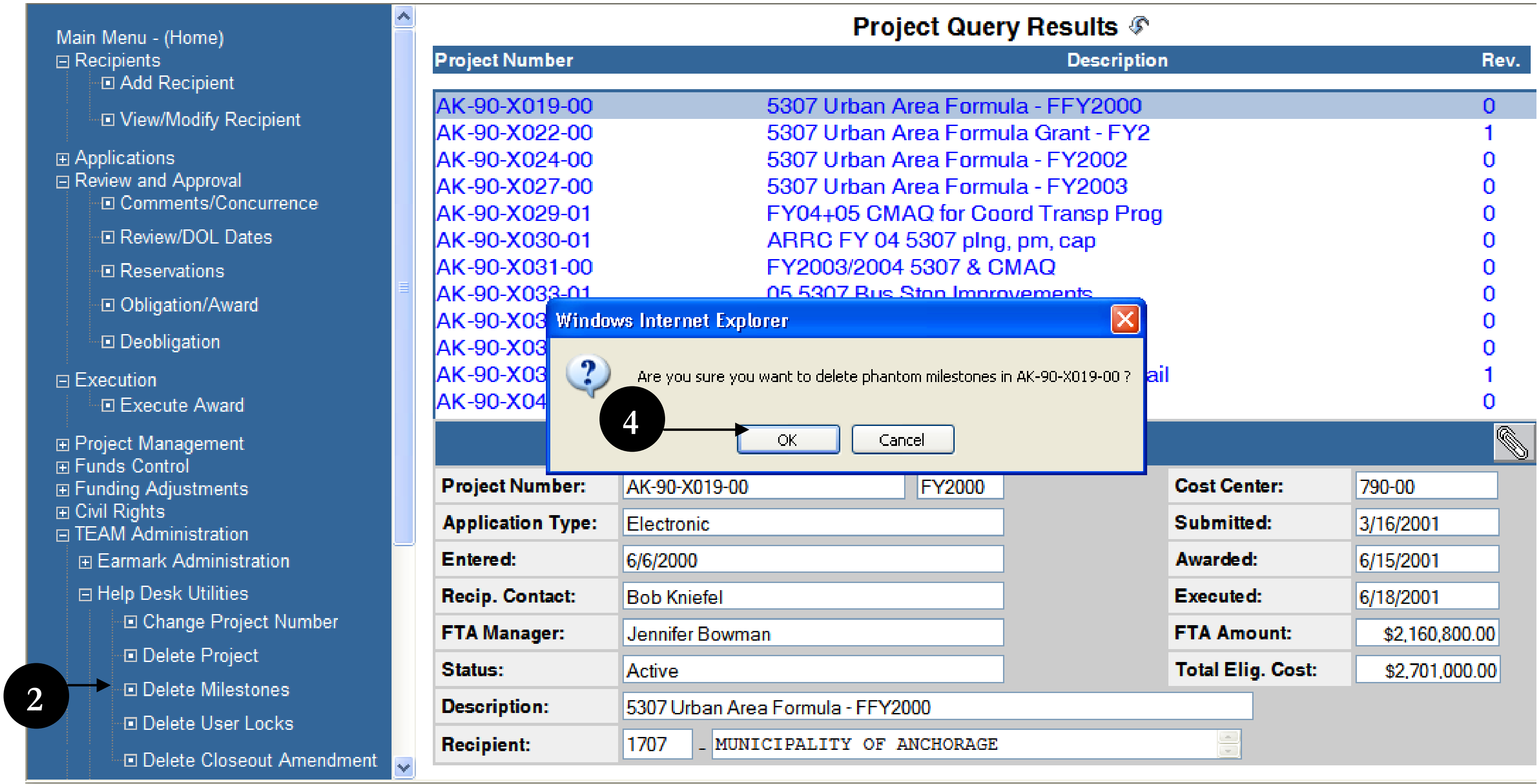


Figure 7

Delete User Locks

1. Click on Delete User Locks in the Navigational Menu (see Figure 8). If no user accounts are locked a dialog box saying "No Outstanding Locks" will appear (see Figure 9).

2. If a user account is locked, it will show up in a table – click on it to highlight/select it and click the DELETE button (see Figure 10).
3. The user account will be unlocked.

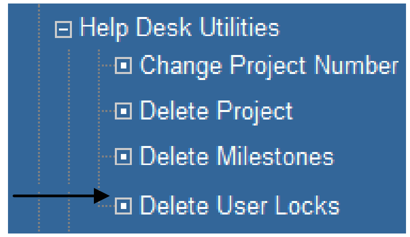


Figure 8

Figure 9

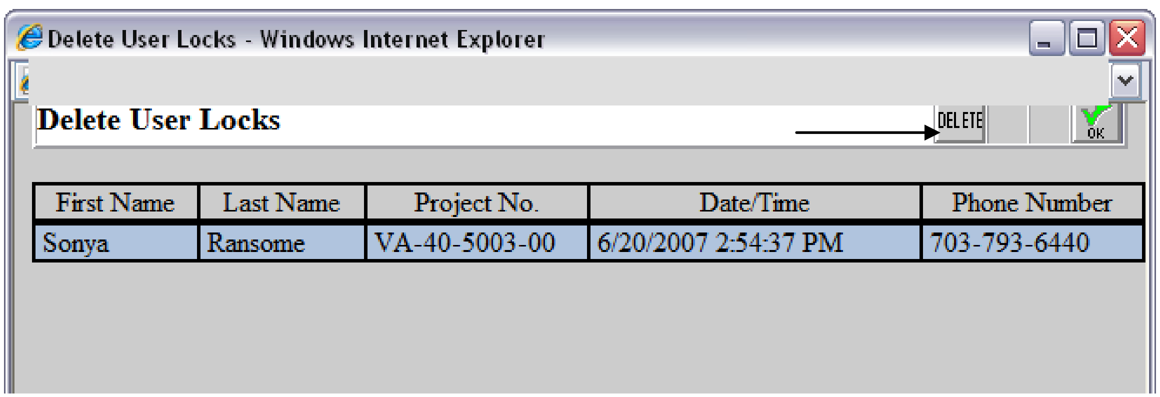


Figure 10

Delete Closeout Amendment

1. First query for a project and highlight the desired project by clicking on it. The project should be in an Active/ Ready for Close-Out or Active/ Close-Out Required status.
2. Then click on the words Delete Closeout Amendment in the main menu under Help Desk Utilities (see Figure 11)
3. A message box with pop up asking whether or not you are sure you would like to delete the closeout amendment.
4. If you are sure that you would like to delete the closeout amendment then click on the OK button. The closeout amendment will be deleted and the previous amendment (the "00" amendment in the example) will return to Active status.

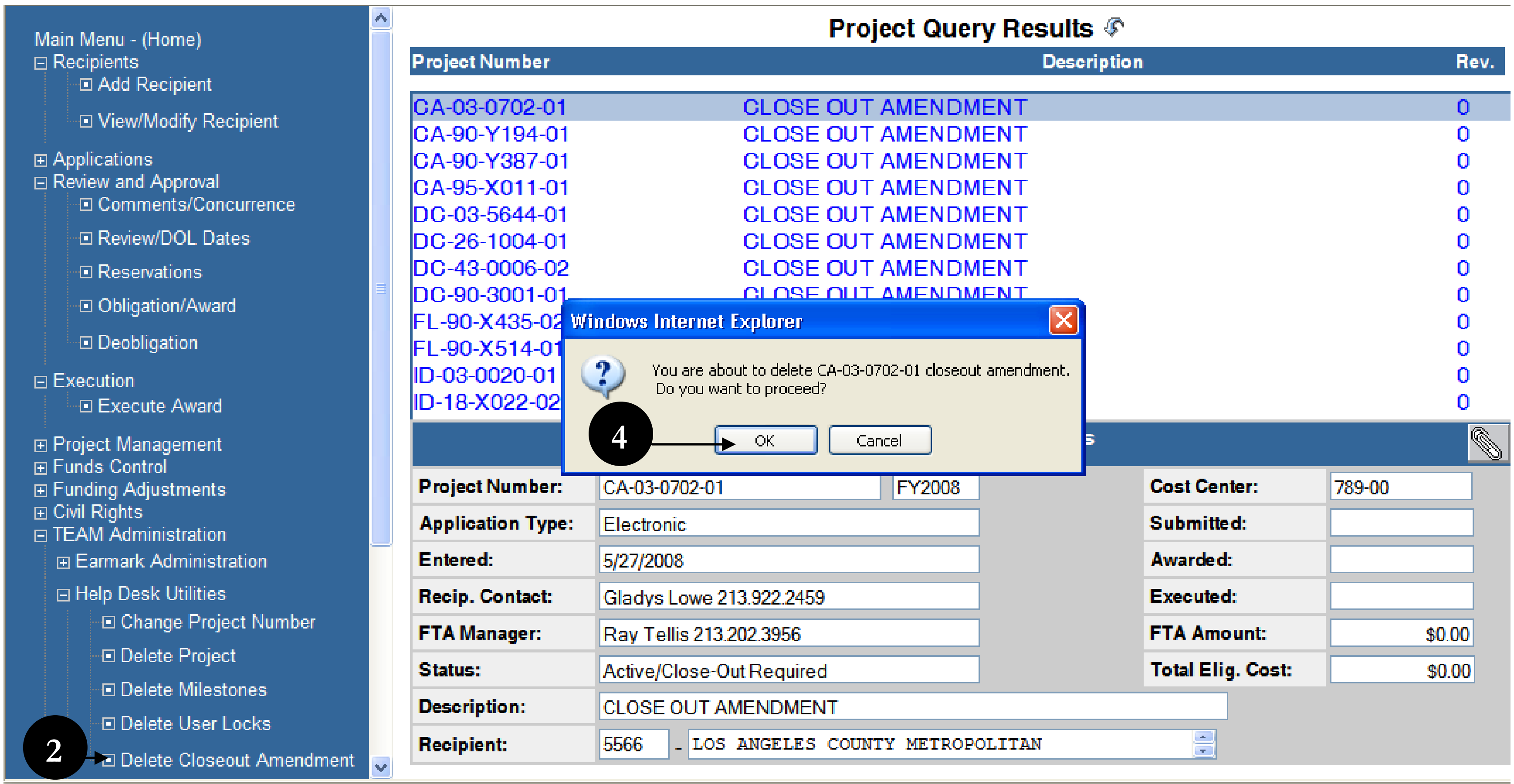


Figure 11

Security

1. To Access TEAM-Web security you must first expand the menu under TEAM Administration by clicking on the plus sign to the left of it.
2. Next, click on the word Security in the main menu. This will expand the menu further and the screen to the right will change revealing a Query User form (see Figure 12)

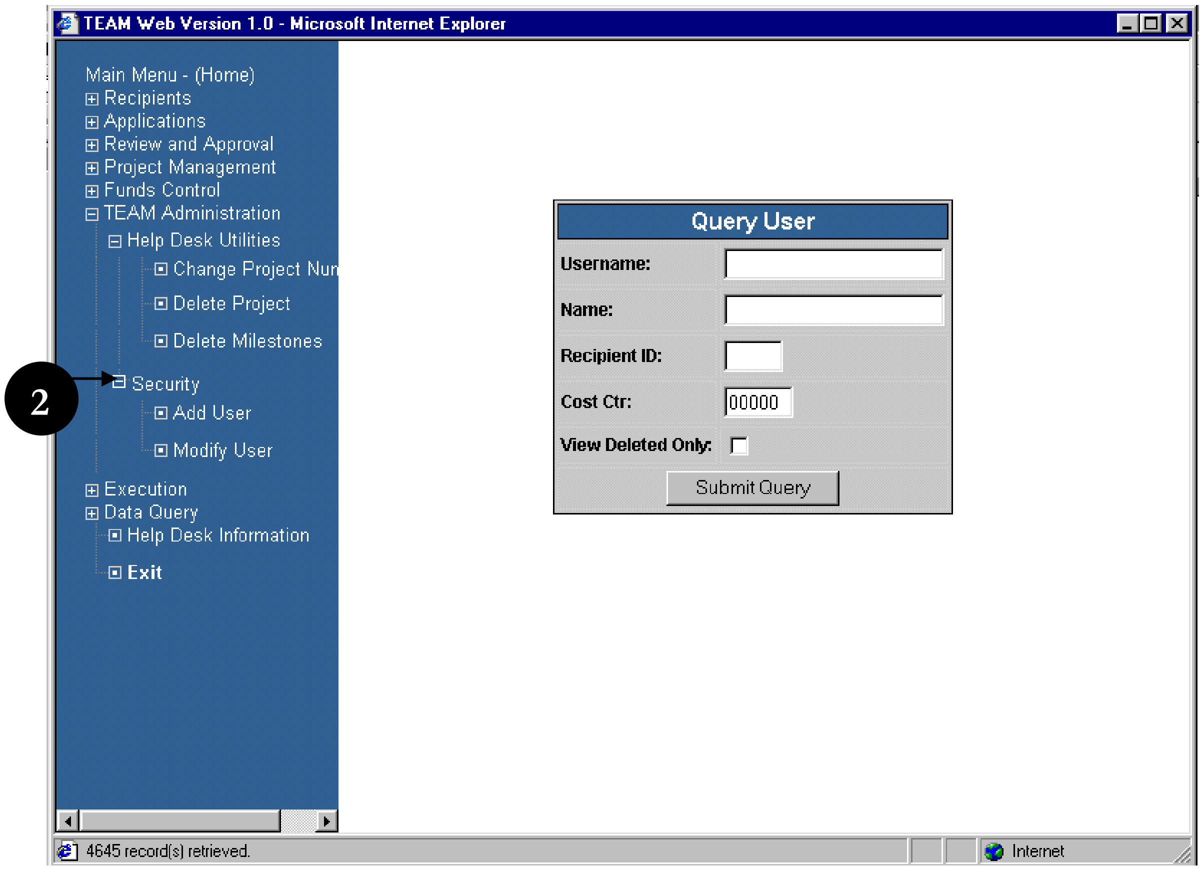


Figure 12

Add User

1. Click on the words Add User on the Navigational Menu.
2. An Add User screen will open up, which is a blank Modify User screen.
3. Once desired credential entered, click save button (icon with diskette design), Certified Date and Certified By fields on Security Info tab will be automatically populated with LSM name and current date.

General Info Tab

4. The screen defaults to the General Info Tab (see Figure 13).
5. Those users with access to this screen may modify/enter data into any one of these fields.

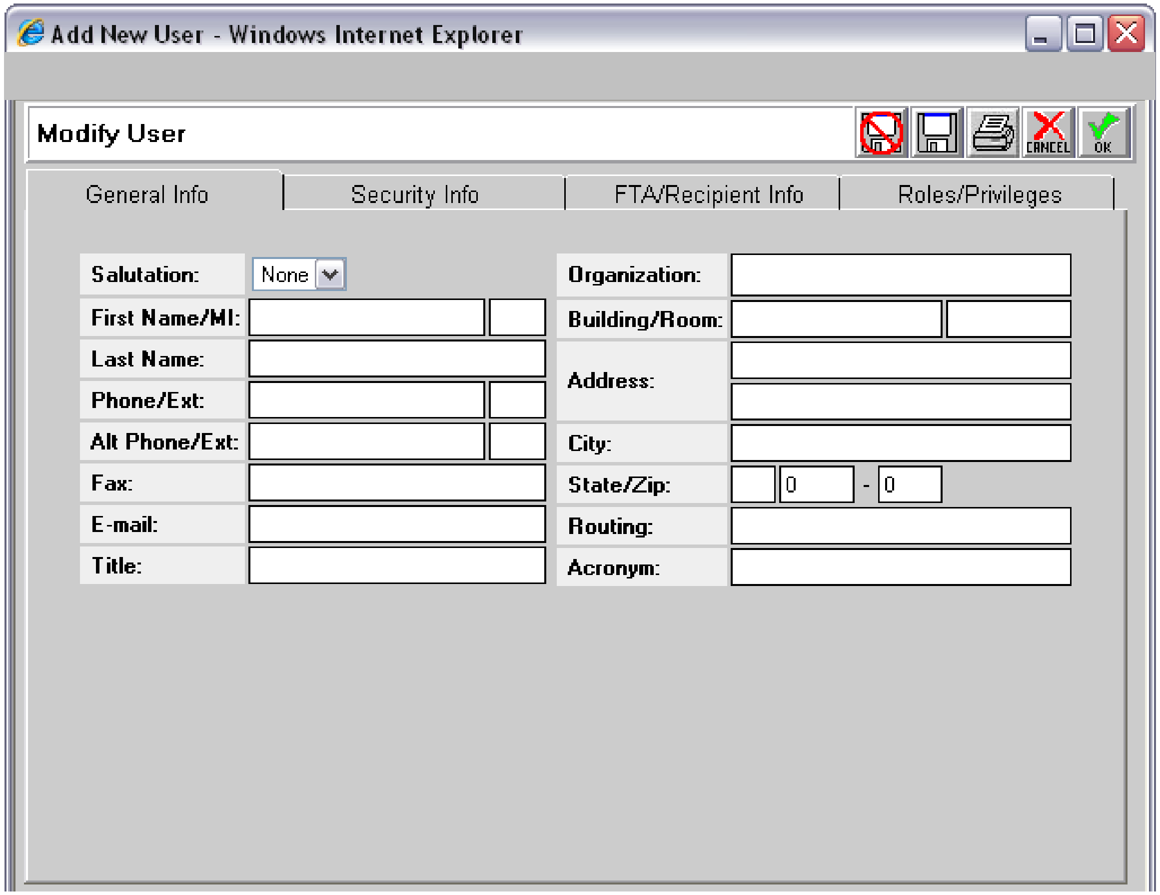


Figure 13

Security Info Tab

6. The Username, Remark, and User Note fields are all manually modifiable. (see Figure 14)
7. A default Identity, random password, date Created, Changed date, Certified Date and Certified By date are all automatically populated.
8. The password can be changed to a new random value by clicking Set Password.

9. The PIN number is generated by clicking on the Set PIN button. The PIN can then be activated by clicking on the Activate PIN button (the Activated date will then automatically populate). If the Delete PIN button is clicked, both the PIN number and the Activated date will disappear.
10. The Delete Account button will gray out all fields and prevent modification.

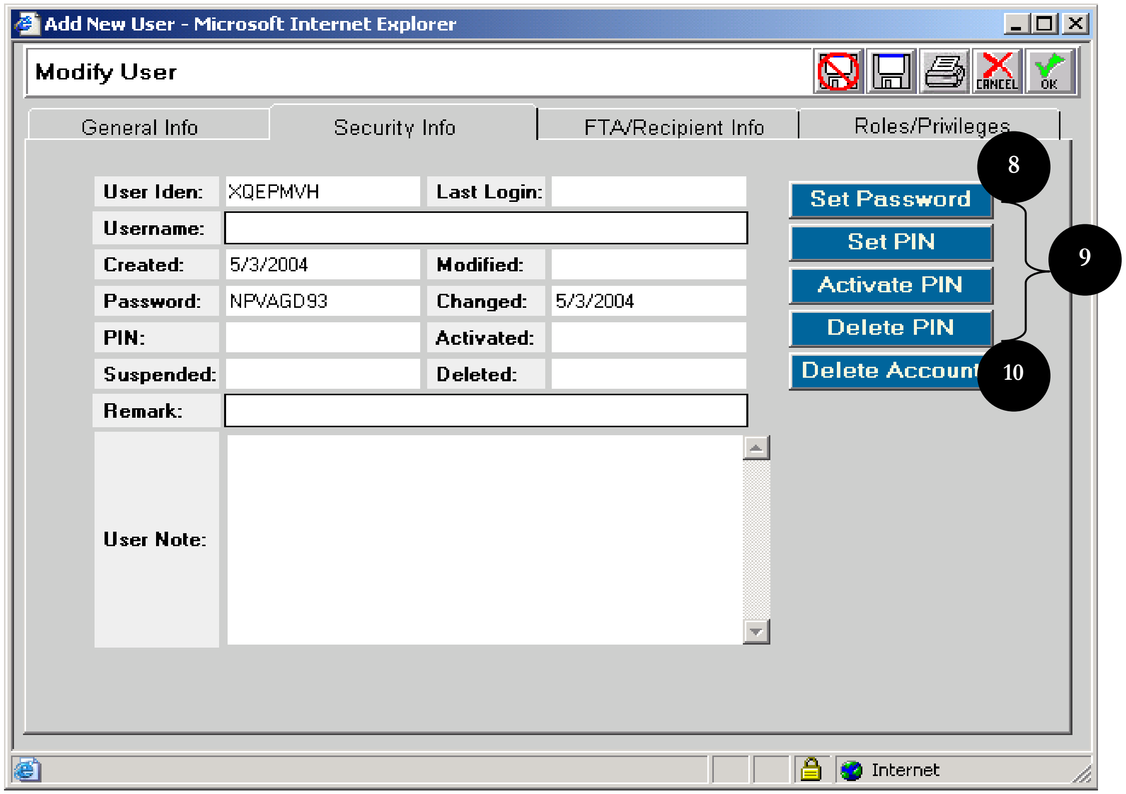


Figure 14

FTA/Recipient Info Tab

11. The Cost Center and Recipient ID information are entered in this tab (see Figure 15).
12. The user can enter in each of the values manually if desired.
13. The details magnifying glass may also be pressed in order to reveal a new screen from which the user can select the data and have it populated for them (see Figure 15).

14. Simply click on the magnifying glass button, select the radio value desired (and in some cases Select all/deselect all functional button will be available), and click OK (see Figure 15).

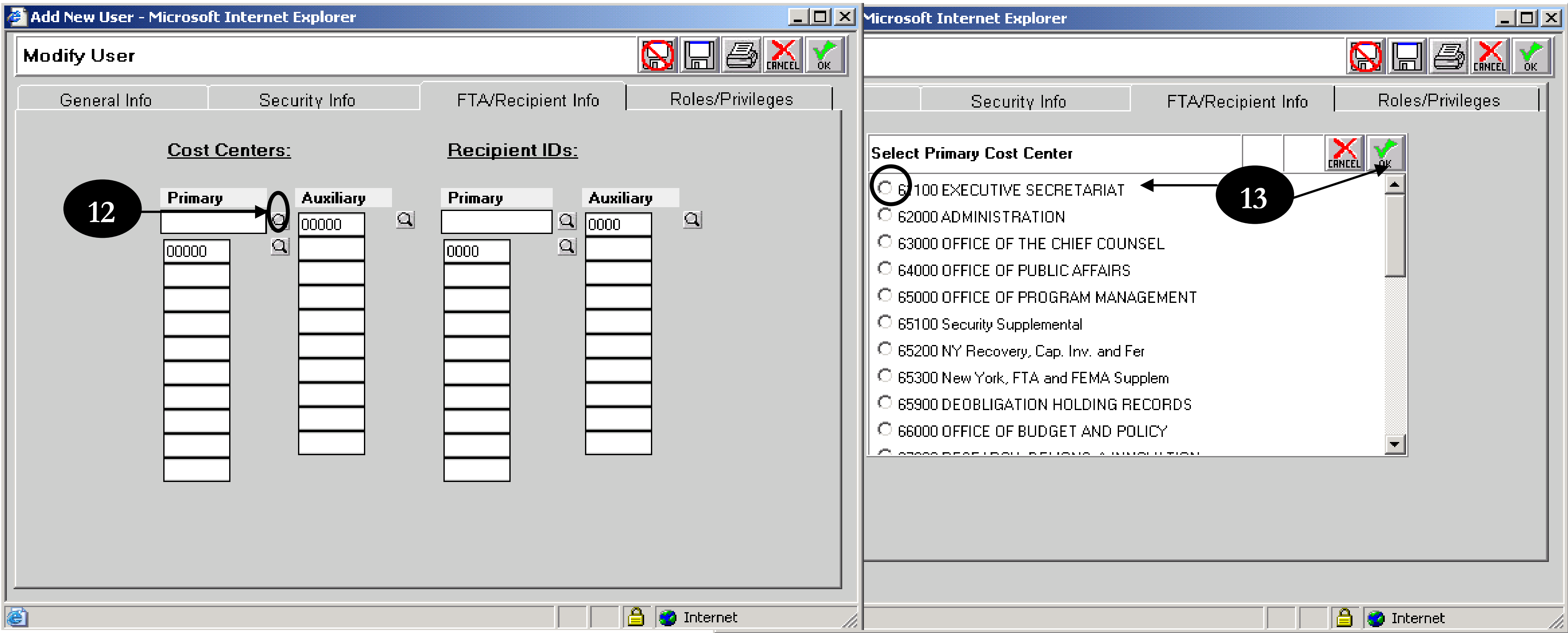


Figure 15

Note: For DBE Civil Rights purposes:

- **Recipient:** "Recipients IDs" primary field dictates which projects are accessible corresponding to the IDs enter.
- **Regional:** "Cost Centers" primary field dictates which projects are group within the designated region provided.
- **Headquarter(HQ):** Dictates by "Roles/Privileges" tab in the next section.
- **Oversight:** Dictates by "Roles/Privileges" tab in the next section.

Roles/Privileges Tab

15. This tab allows the current administrative user to set the rights of the new user (see Figure 16).
16. Select the database the user is to have rights to from the drop down box.
17. Select the role of the user by clicking on the appropriate radio button.
18. Define the user's privileges by selecting the appropriate check boxes.

Note: For DBE Civil Rights purposes (see **Figure 16**):

19. To enable grant user the privilege to initiate and edit a DBE Civil Rights report, they will need to have their user role marked as "Recipient." Once, selected grant user will also need to have "Civil Rights" box and "DBE Reporting" box checked off in their user profile.
20. To enable a FTA user the privilege to monitor and approve a DBE Civil Rights Report, they will need to have "FTA" marked in their user profile. Once, selected FTA user will need to have "Civil Rights" box and "DBE Reporting" checked off in their user profile. FTA user will also need to have one of the three sub-boxes listed under marked DBE Reporting. However, only one option can be selected.

- **HQ**: Headquarter user with privilege to all projects from all regions with rights to approve/disapprove DBE reports.
- **Regional**: Regional user with privilege to all projects within designated cost center(s) to approve/disapprove DBE reports.
- **Oversight**: Oversight user with privilege to all projects from all regions with Read-Only rights.

21. Selecting "Civil Rights Status" will enable user to view and edit "Civil Rights Status" screen but this will not allow FTA users view or perform DBE functions.

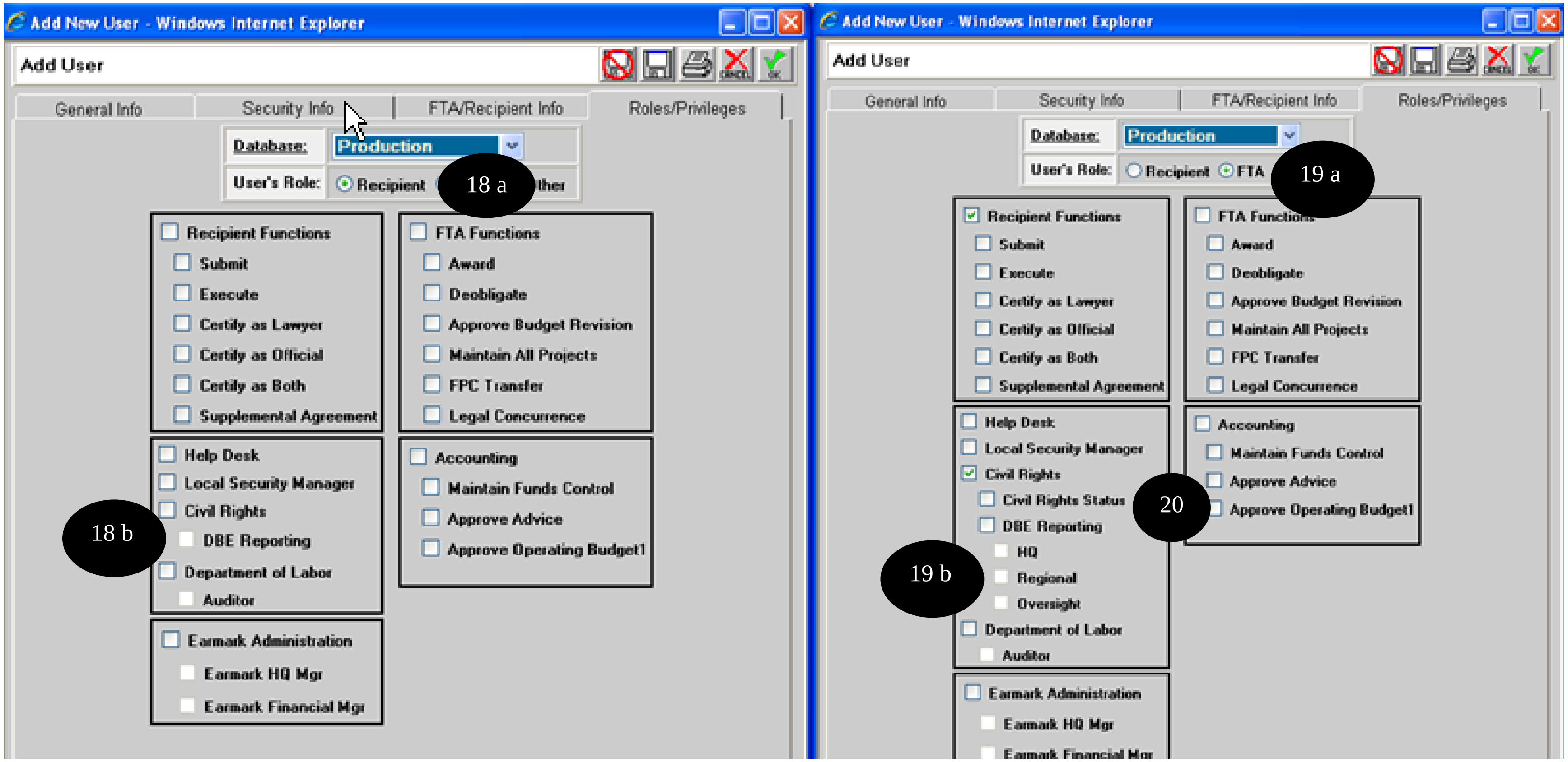


Figure 16

Note: By selecting the general offset privilege check boxes (Recipient Functions, FTA Functions, Accounting, etc.), the user will have rights to the applicable screens, but will not be able to modify or execute various transactions (PINNING, etc).

Modify User

1. To access a user you must first click on the word Security on the main menu to reveal the query form (see Figure 17).
2. Query for a user and then highlight that use by clicking on the data in the results screen.
3. Click on Modify User in the main menu.

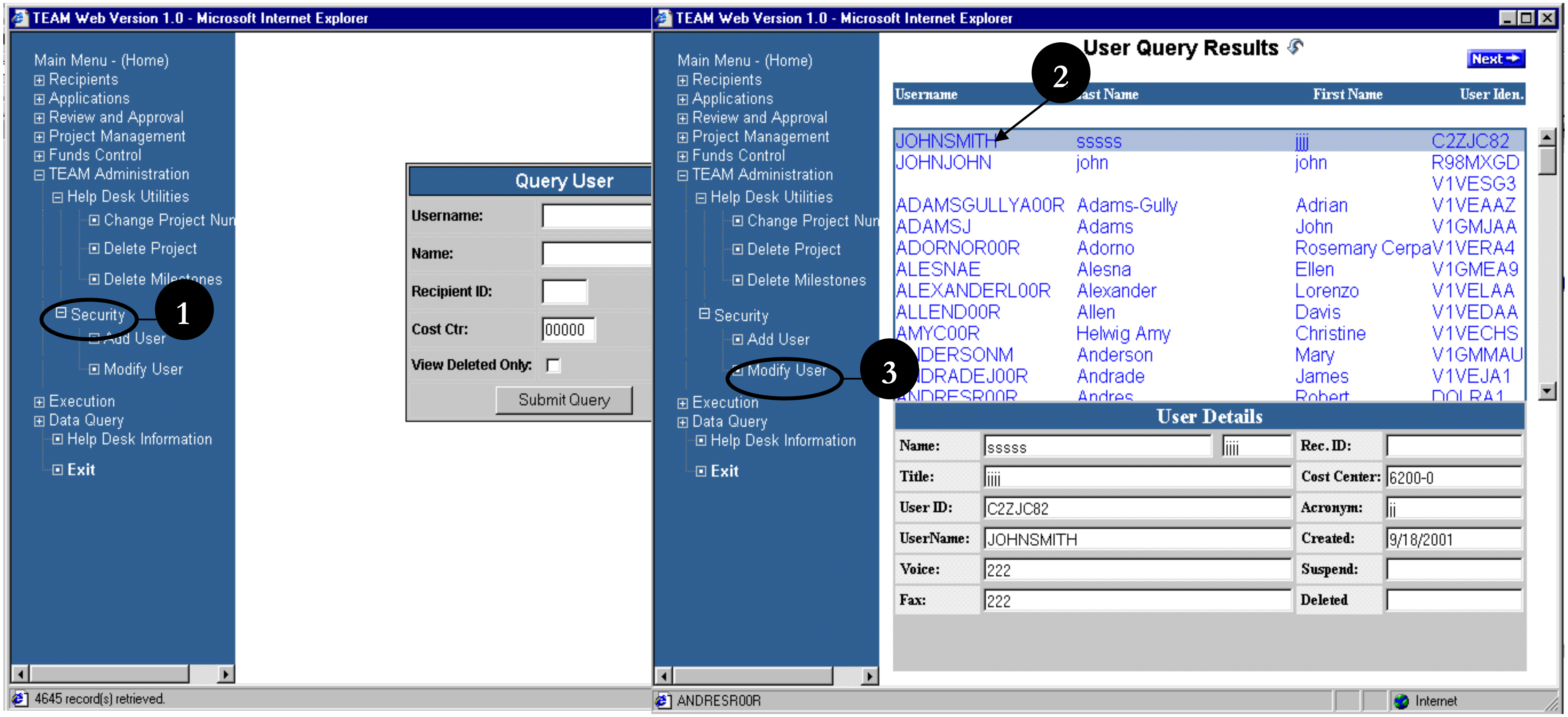


Figure 17

4. Modifying a user follows the same criteria as the Add User functions except for the Security Info Tab (see Figure 18).
5. One notable difference is that the current administrator cannot view the user's password and PIN numbers for security reasons (the user would have been required to change their password when it is first created as well as after any time it is "set" by an administrator).
6. Other notable differences include the Suspend and Reactivate User buttons.
7. Pressing the Suspend User button populates the Suspended date field. This prevents the user from accessing the TEAM-Web system in any way.

8. The Reactivate User button removes the Suspended date as well as the suspension itself (the user will again be able to access the system with all of their established privileges).

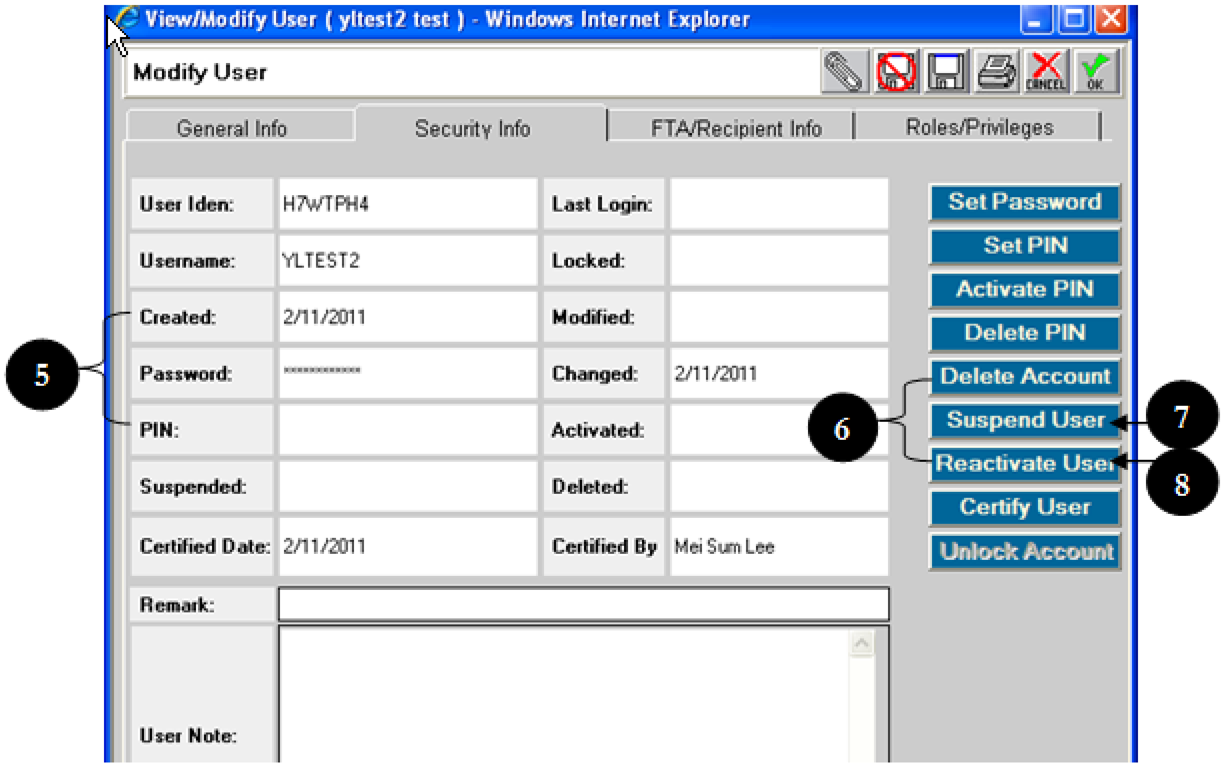


Figure 18

9. Another significant difference is a Certify User button and the corresponding data fields Certified Date and Certified By. The Certify User button is used to document that the user has an Authorized User Access form on file. Clicking the Certify User button will add a date to the Certified Date field. If the account was suspended that date will be removed. Once the save or OK icon is selected the Certified By field will be populated with the certifying officials name. (see Figure 19)

Note: Please refer to the section detailing Add User for all other functions concerning user modification

10. If the account was locked due to any of the scenarios listed below, the "Locked" field will display a date with the reason display in red above Remark field.

1. 3 failed attempts
2. temporary password expires over 14 days
3. activity due to over 60 days
4. inactivity due to over 90 days

11. To unlock account, click on Unlock Account button.

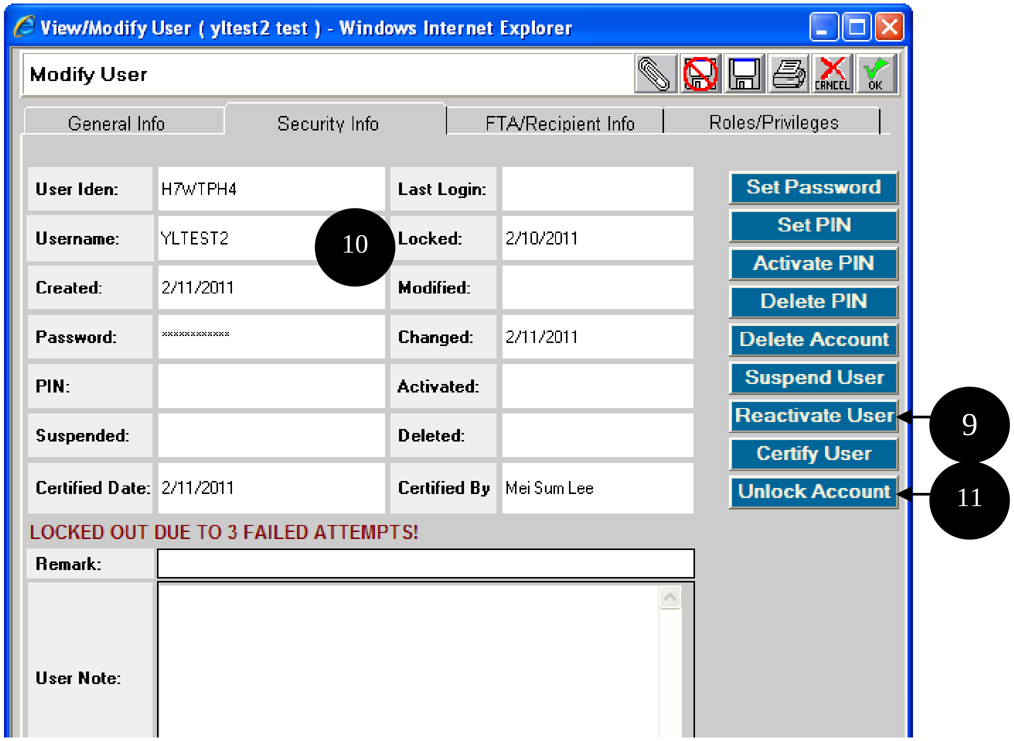


Figure 19

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